



USDA Foreign Agricultural Service

# GAIN Report

Global Agriculture Information Network

Template Version 2.07

Required Report - public distribution

**Date:** 01/12/2004

**GAIN Report Number:** SP4001

## Spain

## Fresh Deciduous Fruit

## Semi-Annual

## 2003

**Approved by:**

Lloyd J. Fleck  
U.S. Embassy

**Prepared by:**

Diego Pazos

---

**Report Highlights:**

**Despite last summer's heat wave, Spain's MY 2003/04 output of apples and pears rebounded from the depressed levels of the previous year. The heat did hurt the crops in many other European countries, raising prices – and export prospects – for Spanish producers. With European prices rising and the dollar falling, U.S. exporters may have much better prospects for shipments to Spain and the EU in MY 2003/04.**

---

Includes PSD Changes: Yes  
Includes Trade Matrix: No  
Semi-Annual Report  
Madrid [SP1]  
[SP]

**Executive Summary..... 3**  
    Apples.....3  
    Pears .....4  
**PSD Tables ..... 5**

## Executive Summary

### Apples

The most recent official forecast for MY 2003/04 commercial apple production (including cider apples) points to a crop of about 745,600 tons, or an increase of 14 percent from the previous year. This forecast includes table apple production of 698,900 tons (+12 percent) and cider apple production of 46,700 tons (+78 percent). About 83 percent of table apples are consumed or exported as fresh product. The remainder is processed into juices, jams and purees. Cider apples are harvested specifically for cider production.

Apple stock levels at the beginning of November 2003, amounted to 244,900 tons, which is about 50 percent higher than stocks of a year earlier; a breakdown, by variety, was as follows:

Varieties	MT
Golden	175,690
American Red	27,769
Galas	15,930
Fuji	9,102
Granny Smith	5,477

Total apple imports during MY 2002/03 amounted to 260,051 tons, or about 41 percent higher than the previous year; this reflects the relatively poor harvest of CY 2002. Spanish imports of U.S. apples declined to about 75 MT in MY 2002/03. Spain exported 66,000 MT of apples in MY02/03, a 50 percent drop from the previous MY.

The larger crop expected in MY03/04 should support larger exports while lowering the need for imports. Short crops in other EU countries will emphasize this trade pattern.

In late November, prices for the main varieties of table apples in cold storage in production areas were as follows:

Variety/size	€/MT
Golden 70+	275
American Red 70+	300
Galas70+color 40-60%	275
Fuji 75+	500
Granny Smith 70+	275

The average price paid so far during MY03/04 for table apples for processing has been €66-72 per ton.

## Pears

The MY03/04 pear commercial crop is estimated at 621,100 tons, up 3 percent from the previous marketing year.

At the end of November 2003, pear stocks amounted to about 244,900 tons, which was some 82,400 tons higher than in the same date of the previous year. In Catalonia, the main pear production region, stocks were reported at 175,731 tons.

On November 1, 2003, stocks in Catalonia were as follows:

Variety/size	MT
Conference 60+	85,042
Blanquilla 58+	54,692
Devoe 60+	3,263
Alejandrina 60+	13,452
Decana 70-90	2,396
Passa Crassana (70-90)	1,179
Flor d'hivern 70-90	5,403
Williams	7,007

In MY 02/03 imports of pears totaled 35,487 tons, some 59 percent higher than in MY01/02 due to the short crop of 1992. Due to both higher domestic production in 2003 and lower production in EU countries, a drop in imports and an increase in export of pears are expected for MY 2003/04.

In production areas (Lerida province), the prices for the main varieties in storage in late November were as follows:

Varieties	€/MT	€/MT
	Cold storage	Controlled atmosphere
Conference 60+	480	
Blanquilla 58+	475	530
Devoe 60+	345	
Alejandrina 60+	345	
Decana 70-90	320	
Passa Crassana (70-90)	285	
Gran Champion	365	
Flor d'hivern 70-90	320	

The average price paid so far during MY 03/04 for pears for processing has been 54-60 €/MT.

Note: Current exchange rate: US\$1.00 = €0.78.

## PSD Tables

Country	Spain						
Commodity	Fresh Apples						
	(HA)(1000 TREES)(MT)						
	2001	Revised	2002	Estimate	2003	Forecast	UOM
	USDA Official	Estimate	DA Official	Estimate	DA Official	Estimate	[New]
Market Year Begin	07/2001			07/2002		07/2003	MM/YYYY
Area Planted	49000	46000	49000	44674	0	44000	(HA)
Area Harvested	46500	45000	47000	44000	0	43800	(HA)
Bearing Trees	0	0	0	0	0	0	(1000 TREES)
Non-Bearing Trees	0	0	0	0	0	0	(1000 TREES)
Total Trees	0	0	0	0	0	0	(1000 TREES)
Commercial Production	882800	922000	711900	652500	0	745600	(MT)
Non-Comm. Production	40000	40000	30000	30000	0	40000	(MT)
TOTAL Production	922800	962000	741900	682500	0	785600	(MT)
TOTAL Imports	176400	184103	228000	260051	0	170000	(MT)
TOTAL SUPPLY	1099200	1146103	969900	942551	0	955600	(MT)
Domestic Fresh Consump	760000	745043	725000	750400	0	651600	(MT)
Exports, Fresh Only	132000	133860	60000	66051	0	120000	(MT)
For Processing	175000	235000	165000	106200	0	165000	(MT)
Withdrawal From Market	32200	32200	19900	19900	0	19000	(MT)
TOTAL UTILIZATION	1099200	1146103	969900	942551	0	955600	(MT)

## PSD Table

Country	Spain						
Commodity	Fresh Pears						
	(HA)(1000 TREES)(MT)						
	2001	Revised	2002	Estimate	2003	Forecast	UOM
	USDA Official	Estimate	DA Official	Estimate	DA Official	Estimate	[New]
Market Year Begin	07/2001			07/2002		07/2003	MM/YYYY
Area Planted	40500	34000	40500	32356	0	32000	(HA)
Area Harvested	38500	33500	38500	32000	0	31800	(HA)
Bearing Trees	0	0	0	0	0	0	(1000 TREES)
Non-Bearing Trees	0	0	0	0	0	0	(1000 TREES)
Total Trees	0	0	0	0	0	0	(1000 TREES)
Commercial Production	694000	694000	606900	603200	0	621100	(MT)
Non-Comm. Production	25000	25000	20000	20000	0	22000	(MT)
TOTAL Production	719000	719000	626900	623200	0	643100	(MT)
TOTAL Imports	22500	22559	30000	35487	0	25000	(MT)
TOTAL SUPPLY	741500	741559	656900	658687	0	668100	(MT)
Domestic Fresh Consump	478200	478259	480100	482954	0	460000	(MT)
Exports, Fresh Only	193300	193300	116800	118002	0	151700	(MT)
For Processing	45000	45000	40000	37731	0	46400	(MT)
Withdrawal From Market	25000	25000	20000	20000	0	10000	(MT)
TOTAL UTILIZATION	741500	741559	656900	658687	0	668100	(MT)